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## Senegal

### Cotton and Products Update

#### 2015 West Africa Cotton and Products Update

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**Report Highlights:**

MY2015/16 seed cotton production in Burkina Faso, Mali, Cote d'Ivoire, Senegal and Chad combined, are expected to drop 10 percent compared to the initial target due to a late start of the rainy season. Seed cotton production may remain the same as the previous year at 1.89 million tons for MY2015/16.

Burkina Faso remains the top cotton producer with 712,000 tons followed by Mali (550,000 tons), Cote d'Ivoire (426,000 tons), Chad (180,000 tons), and Senegal (31,000 tons). Senegal and Chad maintained the same farm gate price as the previous year at \$0.42 per kg and \$0.40 per kg, respectively.

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## **Executive Summary:**

The late start of the MY2015/16 rainy season pushed farmers to either abandon their farms or reduced area planted. Although the rain was well established at the end of July and the beginning of August, C3+2 countries expect to produce 10 percent less seed cotton than their initial target. MY 2015/16 production is expected to reach 1.89 million tons, the same quantity as the previous year.

Burkina Faso still remain the top cotton producer in the region with 712,000 tons, followed by Mali (550,000 tons), Cote d'Ivoire (426,000 tons), Chad (180,000 tons), and Senegal (31,000 tons). As some countries are at the end of their harvest season, production may change slightly.

Chad maintained its MY 2015/16 farm gate price at 240 F CFA per kg (\$0.4 per kg) but input prices for fertilizer and urea increased by 36 percent and 26 percent respectively, compared to the preceding year.

For MY 2015/16, Senegal is expected to maintain the same farm gate and input prices as previous year.

Burkina Faso cotton stakeholders and Monsanto are discussing possible solution for the short length of Bt cotton fiber being produced. (See previous cotton report for more information)

## **MY2015/16 cotton update for selected West African countries**

### **Burkina Faso**

MY2015/16 cotton campaign was delayed in certain parts of the country due to late rains which reduced the initial forecast.

Burkina Faso expects to produce about 712,000 tons of seed cotton in MY 2015/16, an 8.5 percent decrease compared to the initial target (778,000 tons).

Area harvested and yields are estimated at 676,000 and 1.054 tons per hectare, respectively.

Cotton stakeholders and Monsanto are discussing possible solution to the reduced Bt cotton fiber length problem.

### **Mali**

Mali confirmed a shortfall of 100,000 tons compared to the initial target (650,000 tons) due to the late start of the rainy season which led farmers to abandon their field, decreasing overall area planted. Consequently, MY 2015/16 seed cotton production is estimated at 550,000 tons representing 18 percent decrease compared to the initial target, but the same quantity produced the previous year. Area planted is estimated at 545,000 tons per hectares with a yield of 1.009 tons per hectare.

## **Cote d'Ivoire**

Cote d'Ivoire lowered its initial target from 500,000 tons to 450,000 tons at the beginning of the planting season (May and June) due to rain deficit. However, only 426,000 tons of seed cotton has been produced, representing 5.3 percent decrease compared to the previous year and the initial target. Yield is forecasted at 1,065 tons per hectare.

The new cotton classification laboratory is expected to be functional in MY 2015/16.

Cotton stakeholders met in August 2015 and decided to boost yield to 1.200 tons per hectare for the next campaign by using innovative techniques such as improved soil fertility, organic fertilizer, and reinforcement of monitoring and evaluation activities.

Reuters, the international news agency, reported in August 2015 that Cote d'Ivoire expects to produce 600,000 tons in MY 2016/17.

## **Senegal**

Like other countries, Senegal could only plant 90 percent of its initial target due to lack of rains at the beginning of the MY2015/16. Seed cotton production for MY2015/16 is estimated at 31,000 tons with a yield of 1 ton per hectare.

This production represents 11.4 percent decrease compared to Post forecast in August but 19 percent increase compared to the previous year.

## **Chad**

Along with the other countries in the region, Chad did not reach its initial target and its MY2015/16 seed cotton production is estimated at 180,000 tons, a 10 percent decrease relative to its the initial target and 27 percent increase compared to the previous year.

Area planted was reduced after farmers abandoned their field due to the rain deficit at the beginning of the planting season. Only 292,000 hectares were harvested, a 25 percent increase compared to the previous year.

In November 2015, Chad announced its farm gate price at 240F CFA per kg (\$0.40 per kg).

Input prices were fixed at 21,142 F CFA (\$35.23) per bag of 50 kg for fertilizer and 18,915 F CFA per Kg (\$31.52) for urea, representing 36 percent and 26 percent increase, respectively.

**Table 1: Seed Cotton Production: MY 2013/14 – MY 2015/16 (Aug-Jul)**

Selected Countries	2013/14	2014/15	2015/16	2013/14	2014/15	2015/16
	Post Updated Data Production	Post Updated Data Production	Post Forecasted Data Production	Post Updated Data Production	Post Updated Data Production	Post Forecasted Data Production
	(000 Bales)	(000 Bales)	(000 Bales)	(000 Tons)	(000 Tons)	(000 Tons)
Burkina Faso	1,249	1,349	1,353	647	710	712
Mali	850	1,042	1,045	440	548	550
Cote d'Ivoire	780	855	810	405	450	426
Chad	158	270	342	82	142	180
Senegal	56	50	59	29	26	31
<b>Total</b>	<b>3,093</b>	<b>3,566</b>	<b>3,609</b>	<b>1,603</b>	<b>1,876</b>	<b>1,899</b>

(Source: FAS Dakar estimates and official country data)

\*1 Bale = 480 lbs

**Table 2: Official Farm Gate Price for First Quality Seed Cotton\*:  
MY 2013/14 - MY 2015/16**

Selected Countries	Official 2013/14 Farm Gate Price for First Quality (F CFA)	Official 2014/15 Farm Gate Price for First Quality (F CFA)	Official 2015/16 Farm Gate Price for First Quality (F CFA)
Burkina Faso	245 (\$0.40)	225 (\$0.37)	235 (\$0.39)
Mali	250 (\$0.42)	235 (\$0.39)	237.5 (\$0.40)
Cote d'Ivoire	254.5 (\$0.42)	250 (\$0.42)	235 (\$0.39)
Chad	240 (\$0.40)	240 (\$0.40)	240 (\$0.40)
Senegal	255 (\$0.42)	255 (\$0.42)	255 (\$0.42)

\*(Source: Official sources; \$1= 600 F CFA; F CFA per kg)

**Table 3: Official Input Price (Fertilizer and Urea) MY 2013/14 – MY 2015/16\***

<b>Countries</b>	<b>Official 2013/14 Input Price (F CFA)</b>	<b>Official 2014/15 Input Price (F CFA)</b>	<b>Official 2015/16 Input Price (F CFA)</b>
Burkina Faso	Fertilizer: 15,000 (\$25.8) Urea: 15,500 F (\$25.8)	Fertilizer: 14,800 (\$24.6) Urea: 14,800 (\$24.6)	Fertilizer: 15,000 (\$25.8) Urea: 15,000 (\$25.8)
Mali	Fertilizer: 12,500 F (\$20.8) Urea: 12,500 F (\$20.8)	Fertilizer: 11,000 (\$18.3) Urea: 11,000 F (\$18.3)	Fertilizer: 11,000 (\$18.3) Urea: 11,000 F (\$18.3)
Cote d'Ivoire	Fertilizer: 13,330 F (\$22.2) Urea: 11,500 F (\$19.1)	Fertilizer: 14,495 F CFA (\$24.1) Urea: 13,310 F CFA (\$22.1)	N/A
Chad	Fertilizer: 16,000 F (\$26.6) Urea: 15,000 F (\$25)	Fertilizer: 16,000 F (\$26.6) Urea: 15,000 F (\$25)	Fertilizer: 21,142 F (\$35.23) Urea: 18,915 F (\$31.52)
Senegal	Fertilizer: 9,000 F (\$15) Urea: 9,000 F (\$15)	Fertilizer: 12,500 F (\$20.8) Urea: 10,500 F (\$17.5)	Fertilizer: 12,500 F (\$20.8) Urea: 10,500 F (\$17.5)

\*(Source: Official sources; \$1= 600 F CFA; F CFA per kg)

**Production, Supply and Demand Data Statistics** (1000 Hectares (HA), 1000 480 lb. Bales, PERCENT, KG/HA)

<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>	
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>	
<b>Burkina</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Harvested</b>	647	647	660	660	625	676
<b>Beginning Stocks</b>	270	270	255	254	465	338
<b>Production</b>	1250	1249	1350	1349	1200	1353
<b>Imports</b>	0	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0	0
<b>Total Supply</b>	1520	1519	1605	1603	1665	1691
<b>Exports</b>	1250	1250	1125	1250	1250	1380
<b>Use</b>	15	15	15	15	15	15
<b>Loss</b>	0	0	0	0	0	0
<b>Total Dom. Cons.</b>	15	15	15	15	15	15
<b>Ending Stocks</b>	255	254	465	338	400	296

<b>Total Distribution</b>	1520	1519	1605	1603	1665	1691
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<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>	
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>	
<b>Chad</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Harvested</b>	205	205	255	256	250	292
<b>Beginning Stocks</b>	38	38	36	35	76	45
<b>Production</b>	158	158	270	270	250	342
<b>Imports</b>	0	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0	0
<b>Total Supply</b>	196	196	306	305	326	387
<b>Exports</b>	150	151	220	250	240	337
<b>Use</b>	10	10	10	10	10	0
<b>Loss</b>	0	0	0	0	0	0
<b>Total Dom. Cons.</b>	10	10	10	10	10	0
<b>Ending Stocks</b>	36	35	76	45	76	50
<b>Total Distribution</b>	196	196	306	305	326	387

<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>	
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>	
<b>Cote d'Ivoire</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Harvested</b>	445	445	414	415	440	400
<b>Beginning Stocks</b>	285	285	310	310	285	335
<b>Production</b>	780	780	855	855	855	810
<b>Imports</b>	0	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0	0
<b>Total Supply</b>	1065	1065	1165	1165	1140	1145

<b>Exports</b>	725	725	850	800	850	855
<b>Use</b>	30	30	30	30	30	30
<b>Loss</b>	0	0	0	0	0	0
<b>Total Dom. Cons.</b>	30	30	30	30	30	30
<b>Ending Stocks</b>	310	310	285	335	260	260
<b>Total Distribution</b>	1065	1065	1165	1165	1140	1145

<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>	
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>	
<b>Mali</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Harvested</b>	450	450	538	540	580	545
<b>Beginning Stocks</b>	246	246	271	271	538	388
<b>Production</b>	850	850	1042	1042	1100	1045
<b>Imports</b>	0	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0	0
<b>Total Supply</b>	1096	1096	1313	1313	1638	1433
<b>Exports</b>	800	800	750	900	1100	1008
<b>Use</b>	25	25	25	25	25	25
<b>Loss</b>	0	0	0	0	0	0
<b>Total Dom. Cons.</b>	25	25	25	25	25	25
<b>Ending Stocks</b>	271	271	538	388	513	400
<b>Total Distribution</b>	1096	1096	1313	1313	1638	1433

<b>Cotton</b>	<b>2013/2014</b>		<b>2014/2015</b>		<b>2015/2016</b>	
<b>Market Begin Year</b>	<b>Aug 2013</b>		<b>Aug 2014</b>		<b>Aug 2015</b>	
<b>Senegal</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Harvested</b>	32	32	25	25	35	35
<b>Beginning Stocks</b>	12	12	13	13	8	13
<b>Production</b>	56	56	50	50	65	59
<b>Imports</b>	0	0	0	0	0	0
<b>MY Imports from U.S.</b>	0	0	0	0	0	0
<b>Total Supply</b>	68	68	63	63	73	72
<b>Exports</b>	50	50	50	45	55	53
<b>Use</b>	5	5	5	5	5	5



<b>Loss</b>	0	0	0	0	0	0
<b>Total Dom. Cons.</b>	5	5	5	5	5	5
<b>Ending Stocks</b>	13	13	8	13	13	14
<b>Total Distribution</b>	68	68	63	63	73	72